Meat, Fish & Seafood and Ready meals: Current trends and innovations

February 2022

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1. Introduction

The present consumer and market report, titled **“Meat, Fish & Seafood, and Ready meals: European market, consumer trends, and innovation”,** provides an analysis of the sector, with a special focus on health. The geographical scope of the report is Europe, spotlighting the Atlantic Area countries (France, Ireland, Portugal, Spain, and United Kingdom). In the report, the production, value and volume of sales of the sector, as well as product launching, main positionings, consumer trends and market health claims were evaluated. The main information sources have been Innova Database, Innova Markets Insights, GlobalData, and European Commission databases, among others.

The following categories have been analysed: Meat (Meat products, Poultry and Deli meat), Fish & Seafood, and Ready meals.

The present report is part of a series of “consumer, market and innovation reports” that represent one of the several innovation support services for SMEs implemented in the scope of the project **“AHFES - A quadruple helix Atlantic Area healthy food ecosystem for growth of SMEs”**. The aim of this service, delivered by the Galician Food Cluster (Clusaga), is to provide to Atlantic Area SMEs working in the healthy food segment with information and knowledge helpful to guide their strategies within a specific market sector or country, as well as for the preparation of their product or commercial strategies.

AHFES: A quadruple helix Atlantic Area healthy food ecosystem for growth of SMEs

AHFES (*Atlantic Healthy Food EcoSystem*) is a European project funded by the Interreg Atlantic Area programme. The purpose of AHFES is to improve the overall competitiveness and growth of SMEs in the value chain of healthy food & lifestyles by contributing to enhancing a transnational innovation ecosystem that helps SMEs access knowledge, partners and markets and align their products and services to consumer needs and expectations.

Throughout the project duration (form March 2019 to August 2022), AHFES will deliver the following outputs:

- Intelligence gathering on current consumer trends regarding healthy food and lifestyles
- Mapping of the Atlantic Area healthy food and lifestyles innovation ecosystem
- Facilitation of networking and support in building transnational innovation partnerships
- Innovation training actions for SMEs
- Services tailored to SME needs

AHFES is implemented by the following organisations:

2. The Market

2.1 Meat

The meat market size reached almost $900 billion in 2021 and is forecasted to surpass $1,500 billion by 2026 at a CAGR of 1.8% to meet the demand of the global population growth rate. In 2020, the Asia-Pacific region covered around 50% of the global meat products market, followed by North America with 22% of the global market. The poultry sector is the fastest growing agricultural sub-sector and stands out as the most widely produced type of meat in recent years.

Considering their revenue, Cargill (US), JBS (Brazil) and NH FOODS (Japan) are the three largest meat companies.

Ranking of the top five most valuable meat companies in 2020 worldwide.

Position	Brand name	Revenue (billion USD, 2020)
1	Cargill, Inc. (US)	114.6
2	JBS S.A. (Brazil)	52.4
3	NH FOODS LTD. (Japan)	11.8
3	ConAgra Foods (US)	11.0
4	Hormel Foods (US)	9.6

Source: Macrotrends

In Europe, in contrast, meat consumption per capita is projected to decline. From 2010 to 2020, per capita meat consumption fell in the five biggest economies in the European Union. This is also reflected in sales growth, which has slowed down and with an expected CAGR in Europe of below 1% between 2021 and 2025. Poultry is the only meat category that is expected to grow between 2020 and 2030.

Price and taste are no longer the common purchase drivers since consumers demand more natural, sustainable and healthy products. This context is an opportunity for meat manufacturers to add value to their products by creating natural, sustainable and healthy foods. During 2017 to 2021, value and volume growth of meat products subcategory averaged at 3.9% and 1.8%, respectively.

2.2 Fish & Seafood

The global seafood market reached a value of around $250 billion dollars in 2021 and is projected to reach nearly $350 billion by 2025, with a projected CAGR of 4.8%. Asia-Pacific region is on top of the sector, with China accounting for over 60% of global aquaculture production. It is a major fish producer, accounting for 35% of global fish production.

Global consumption of fish is growing. Factors such as a wider awareness of the health benefits and the nutritional values associated with fish and seafood products are contributing to its market growth. This is particularly noticeable in Europe, where the per capita yearly consumption is 24.4 kg of fish or seafood in average, 4 kg more than globally.

Four out of the five largest companies according to their revenue are located in Asia.

Ranking of the top five most valuable fish & seafood companies in 2020 worldwide.

Position	Brand name	Revenue (billlion USD, 2020)
1	Maruha Nichiro Corporation (Japan)	8.2
2	Nippon Suisan Kaisha (Japan)	6.3
3	Mowi ASA (Norway)	4.4
4	Thai Union Group (Thailand)	4.4
5	Mitsubishi Corporation (Japan)	122.5*

*Mitsubishi's seafood activities by subsidiaries (e.g Cermaq, Norway; Princes Group, UK; Toyo Reizo, Japan

Source: Dun & Bradstreet

In Asia, a large population base, rising income levels, urbanization, greater preference for fish and seafood over meat products owing to its health benefits, consumers' switch to sustainable foods due to environmental concerns, convenient and time-saving launches, indulgent recipes, diverse ranges and packaging innovation are contributing to sales value growth.

In the period 2016 to 2020, value and volume growth for the subcategory averaged 6.2% and 4.2%, respectively.

2.3 Ready meals

The global ready meals market has an approximate value of $150 billion and is expected to grow at a rate of around 5% until 2026. North America region presents the higher rate of ready-made dishes per capita consumption, followed by Europe, with a market worth of an estimated $52 billion. In Europe, the United Kingdom is the main consumer of ready meals with average per capita consumption of 19 kg per year, followed by France. Conversely, Asian countries currently consume very few ready meals with an average per capita consumption of 3.5 kg per year.

The demand for these convenience products is on the rise, particularly after the COVID-19 pandemic. The main market driver is the convenience formats, leading to time-save and ease of handling and storage. Other factor is the rising demand for natural ready-meals, with few or no additives especially in Europe. Globally, consumers have increased the purchase of Ready-to-Eat (RTE) that are easy to cook and less time consuming.

The main companies according to their revenue are Nestle (Switzerland), Unilever (UK) and The Kraft Heinz Company (US).

Ranking of the top five most valuable ready meals companies in 2020 worldwide.

Position	Brand name	Revenue (billlion USD, 2020)
1	Nestle (Switzerland)	92.7
2	Unilever (UK)	57.9
3	The Kraft Heinz Company (US)	26.2
4	ConAgra (US)	11.0
5	Dr. Oetker (Germany)	3.7

Source: Dun & Bradstreet, Macrotrends

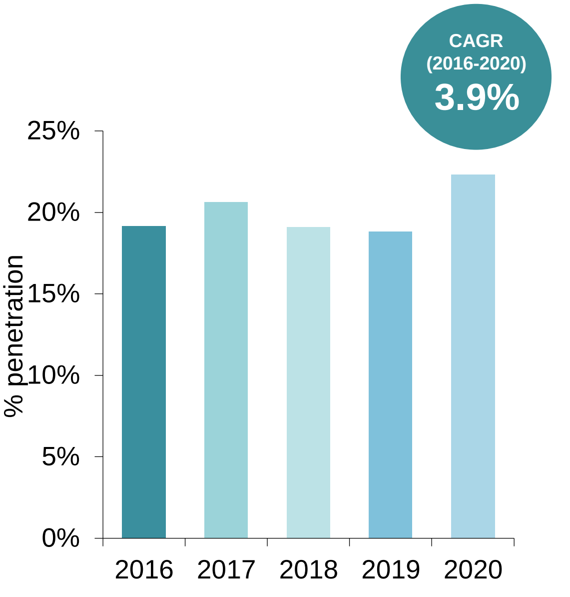
Ready meals' value growth is in line with the volume growth, both with an average of 3%.

3. New products and positioning

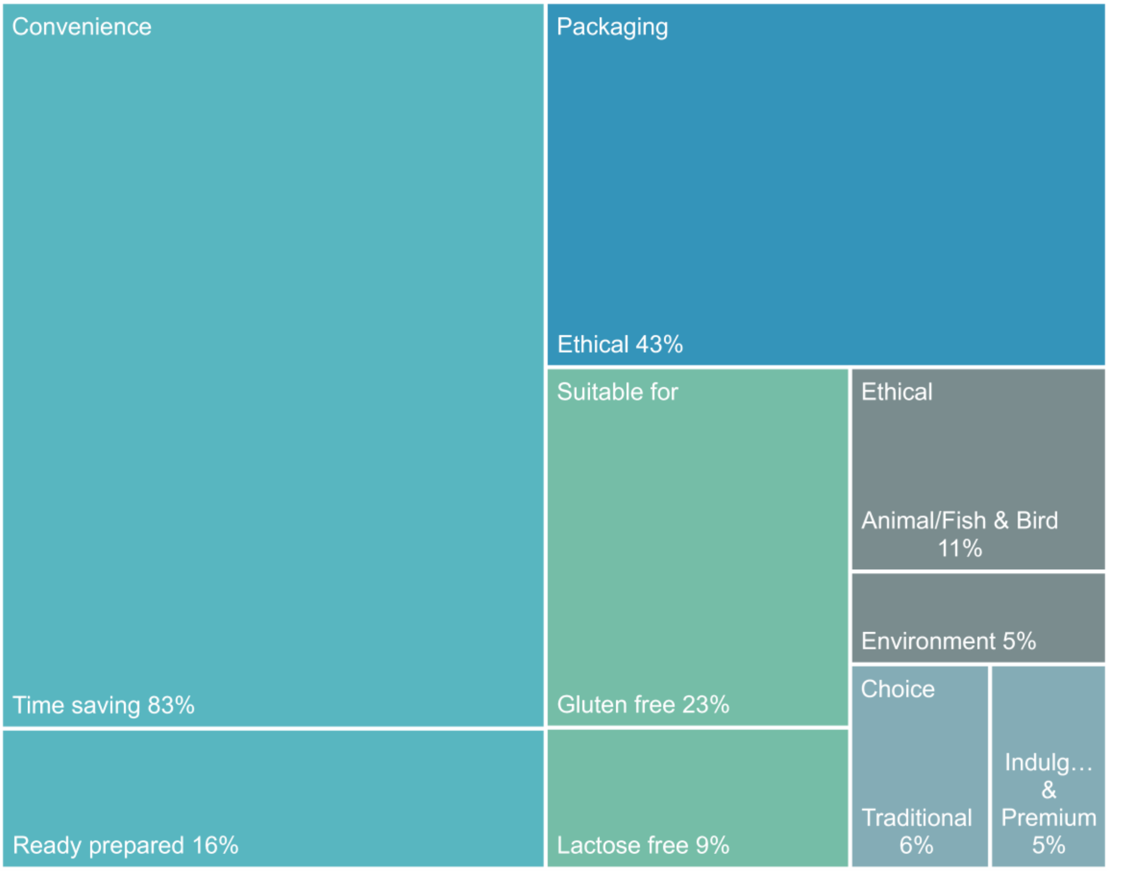
3.1 New products and positionings in Europe – Meat

The launches of meat products within the period 2016-2020 remained stable, with a slight increase in 2020 which leads to an accumulated growth of 3.9%. The maim positionings were *Convenience* products which save time in preparation or are ready prepared, *Ethical packaging* and *Gluten free.* Other positionings growing are *Animal welfare* which presents a strong growth (30%), *Environment* care (19%) and *Indulgent & Premium*, with a growth of 12%.

New products in Europe – Meat

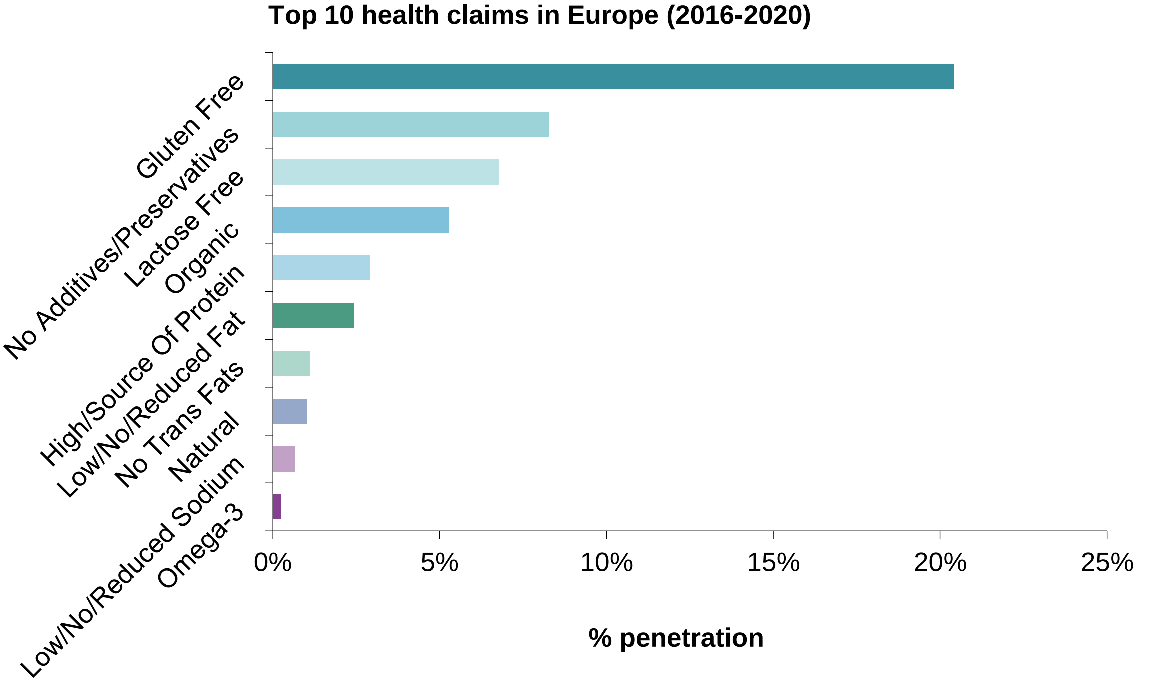


Top 10 positionings in Europe (2016-2020)



3.2 Health claims in Europe – Meat

Gluten free is the main health claim within meat products, followed by *No additives/preservatives*, which grows at a rate of 4%, *Lactose* Free, which presents a growth of 5%, and *Organic,* with a growth of 6%. Additionally, other claims such as *High/Source of protein* and *Natural* are growing at rates of 19% and 10%, respectively.



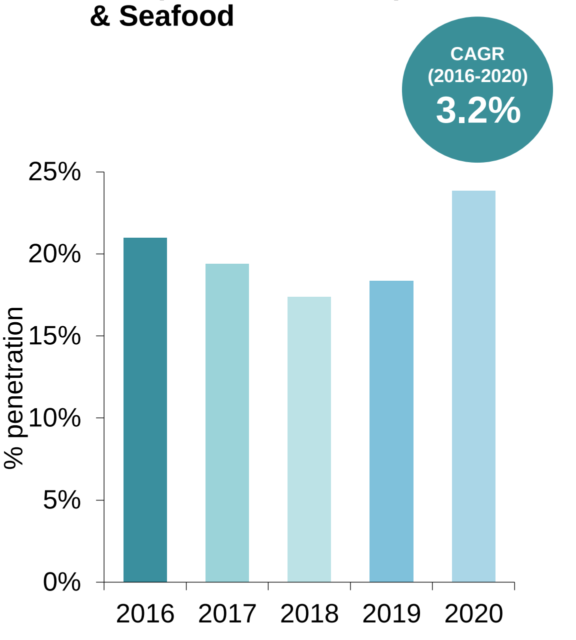
Turkey breast free from colorings (**Spain**).

Chicken breast naturally high in protein (**United Kingdom**).

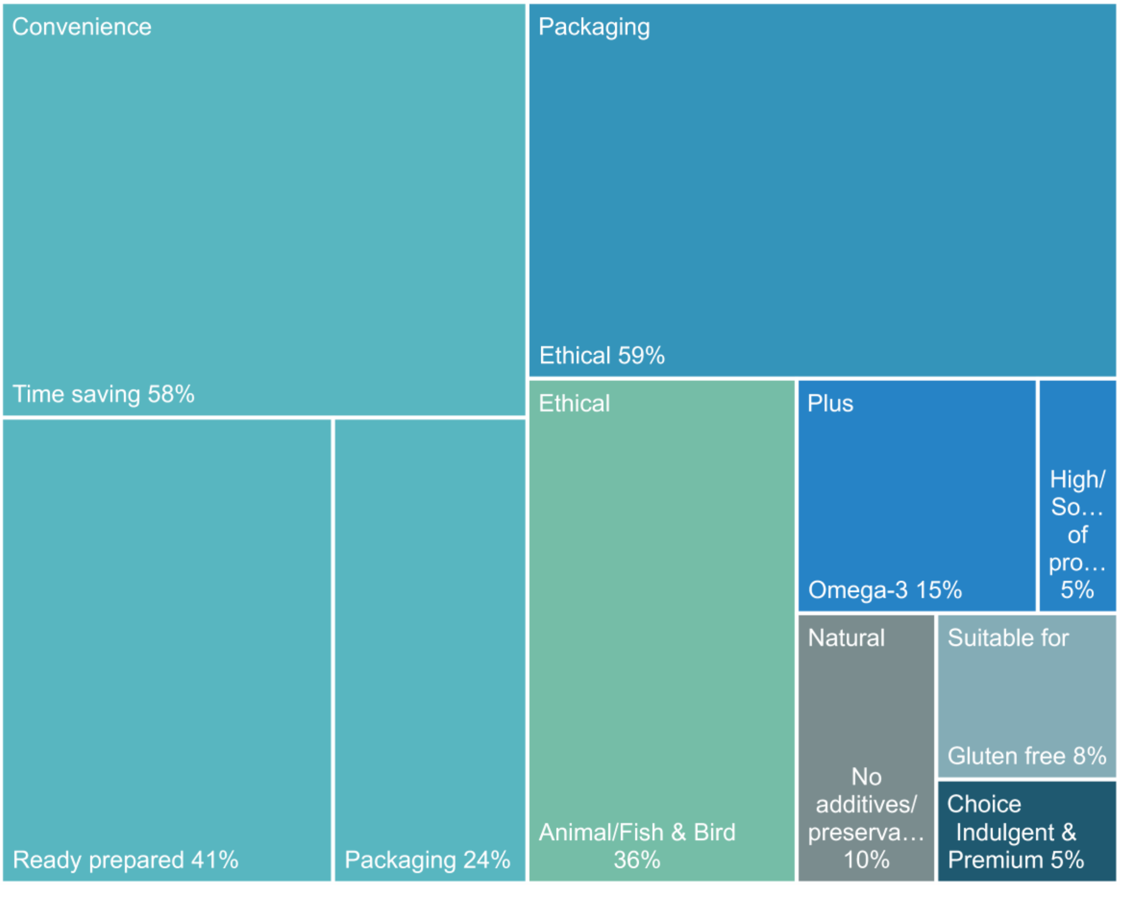
3.3 New products and positionings in Europe – Fish & Seafood

The launches of fish within the period 2016-202 showed a stable behaviour, with a decrease from 2016 to 2018 and a subsequent recovery until 2020. The accumulated growth was 3.2%. The maim positionings are *Ethical packaging,* which is growing at a rate of 6%, *Convenience* products which save time in preparation or are ready prepared, which grows at a significant rate pf 25% and *Animal welfare*, the latter presenting a growth of 10%. Other growing trend *High/Source of protein* (20%).

New products in Europe – Fish & Seafood



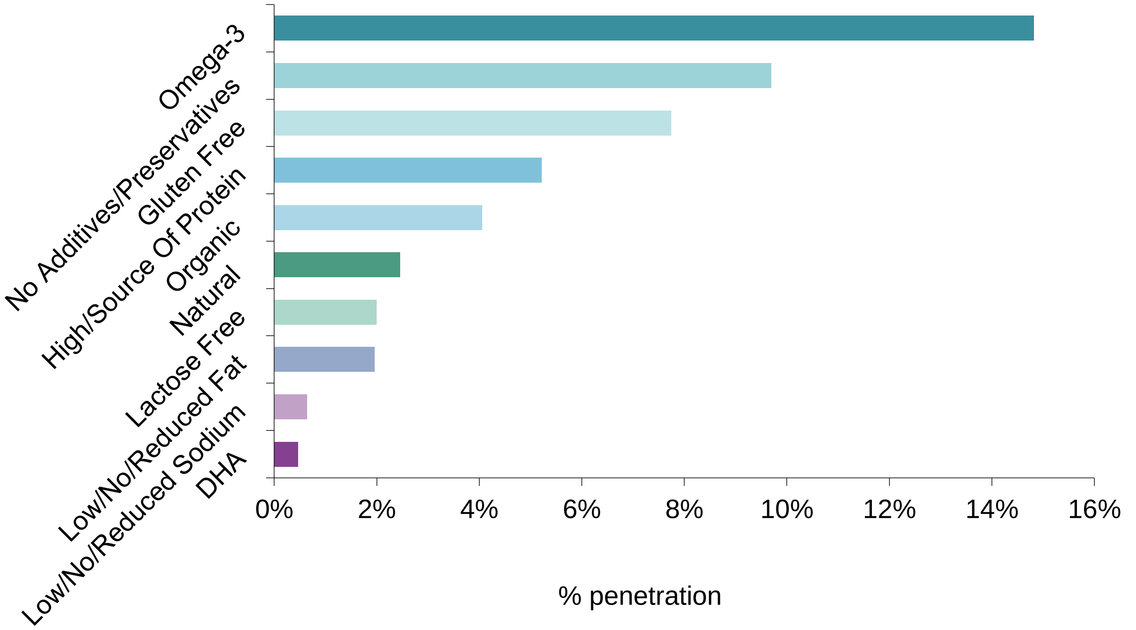
Top 10 main positionings in Europe (2016-2020)



3.4 Health claims in Europe – Fish & Seafood

Omega-3 is the main health claim in fish new products and is growing at a rate of 9%. Other popular health claims are *No additives/preservatives, Gluten free* and *High/Source of protein*, the latter growing at a rate of 20%. Other growing claims are *Lactose free* (8%) *Organic* (7%) and Natural (8%).

Top 10 health claims in Europe (2016-2020)



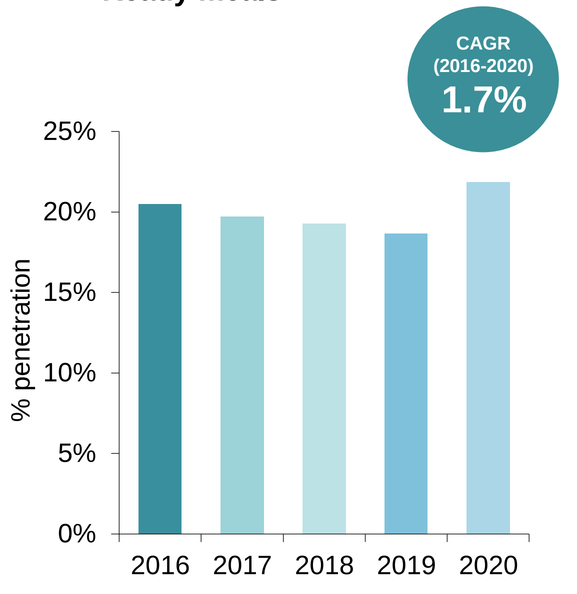
Mackerel fillets in olive oil, rich in omega-3 (**Ireland**).

Squid ring with no additives (**France**).

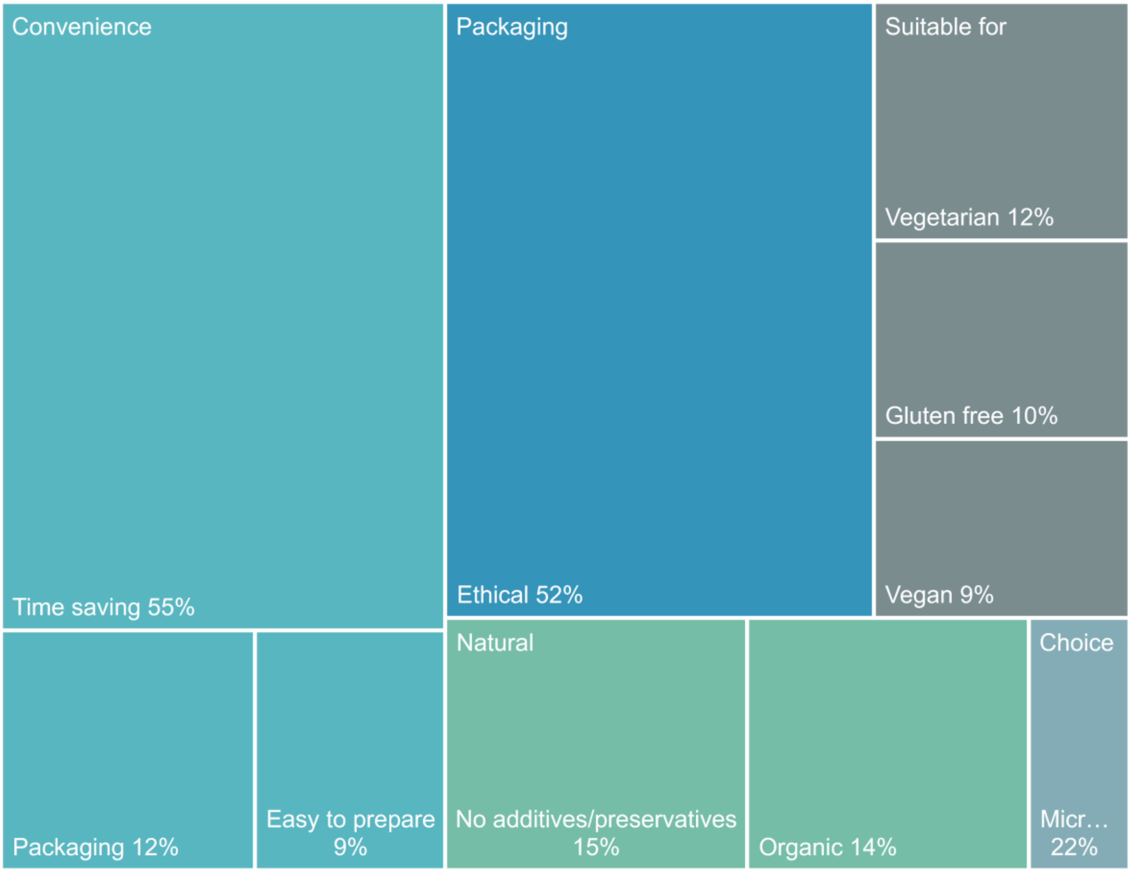
3.5 New products and positionings in Europe – Ready meals

Ready meal launches within the period 2016-2020 remained stable with a slight peak in 2020 and an accumulated rate of 1.7%. The main positioning trends are *Convenience* and *Ethical packaging*, growing at rates of 20% and 5%. *Microwaveable* is other popular positioning. A significant growing positioning is *Vegan*, with a rate of 20%, and *Organic*, with a growth of 4%.

New products in Europe – Ready meals



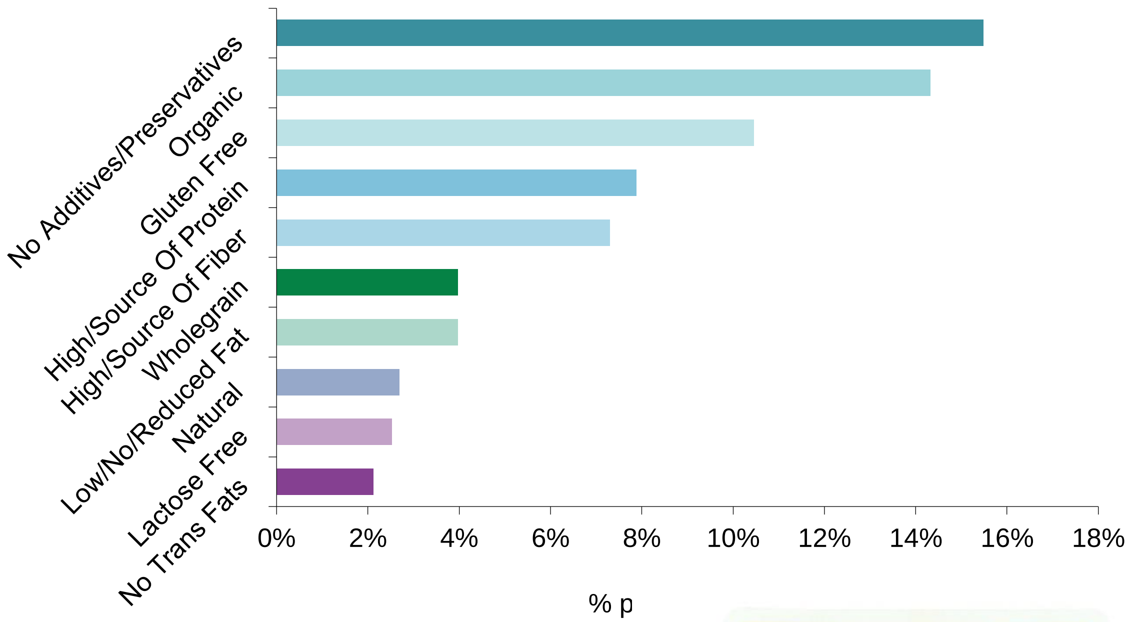
Top 10 main positionings in Europe (2016-2020)



3.6 Health claims in Europe – Ready meals

No additives/preservatives and *Organic* are the main health claims in ready meals, the latter growing at a rate of 4%. Other recurrent claims are *Gluten free*, *High/Source of protein,* which grows at a rate of 9%, or *High/Source of fibre*. Other growing trend is *Lactose free* (12%).

Top 10 health claims in Europe (2016-2020)



Lasagna with no artificial colors or flavors (**United Kingdom**).

Precooked quinoa with vegetables certified AB organic (**France**).

4. Top trends

4.1 Meat

4.1.1 Sustainability

An increasing number of consumers seek for meat brands with clear communication on sustainability, clean-label and animal welfare. Health and environmental claims are growing rapidly. 1 in 3 shoppers relate ethical and environmental factors to a higher quality. Additionally, 81% of consumers feel the label “made with natural ingredients” is appealing and 78% of consumers say the label “free from artificial ingredients” is of interest. The industry responds manufacturing products with no nitrates or nitrites, no added hormones or steroids, minimally processed and with no artificial ingredients, flavors or colors and no preservatives.

Roast pork fillets, with the best remuneration for farmers, and pork raised without antibiotics and fed without GMO (**France**).

Beef steak in a paper skin pack tray, with AENOR certification for animal welfare (**Spain**).

4.1.2 Convenience

Consumers are demanding meat snacks with more functional benefits, and a half of the consumers say it is appealing for snacks to be high in protein. Also, traditional meat snacks are being reformulated for a more natural product image. Ready to cook chicken products are wining the market. Grab-and-go solutions for deli meat such as pre-packaged slices or case-ready materials offering end users innovative prepared products for quick meals.

Smoked lean bacon lardons in a resealeable pouch (**Ireland**).

Microwaveable Iberian pork meat in sauce (**Spain**).

4.1.3 Health

Over half of global consumers say they are making healthier food choices than a decade ago, and more nutritious foods are increasingly of interest among consumers. This has a special relevance for processed foods. Current trend in higher protein and lower-carb diets, such as keto options, make consumers particularly receptive to positive health messages about meat, especially white meat.

Poultry sausages with reduced salt content, high in proteins and gluten free (**Portugal**).

Turkey and plant burgers, high protein, source of fiber and with less than 5% fat (**United Kingdom**).

4.2 Fish &Seafood

4.2.1 Sustainable certified fish and seafood

Demand for sustainable seafood continues to grow. Particularly in Europe, seafood sustainability is a growing political trend. Also, a growing number of chefs opt for sustainable options on their menus. Thus, sustainability and transparency remain key selling points for seafood. An increasing number of consumer are switching brand and products for environmental reasons, consuming other species or reducing seafood consumption altogether. It is expected that consumers will increasingly make choices based on the traceability and environmental impact of their seafood.

Hake fillet steak without skin, in a plastic packet reducing plastic to achieve a more sustainable and environmentally friendly packaging. Pescanova hake is from sustainable fishing, so by choosing our products you actively participate in conserving the marine ecosystem and the future availability of the species. Green Dot certififed. Nutriscore A (**Spain**).

Wild Alaskan smoked salmon from sustainable fishing, certified by the MSC sustainable fishing label (**France**).

4.2.2 Storytelling

Consumers show interest about the stories behind the food, the product health benefits, how it is produced, its origin, and its journey from its origin to the table. If the fish products are sustainably caught as well as the social and working conditions at the company is information that consumers increasingly demand.

Waitrose & Partners are members of the Sustainable Seafood Coalition, working only with fisheries and aquaculture farms that are committed to responsible sourcing and animal welfare. In 2021, their fish counters were recognised as the best in the UK for the fourth year in a row by the Marine Stewardship Council, which certifies sustainable fishing with its blue-fish label (**United Kingdom**).

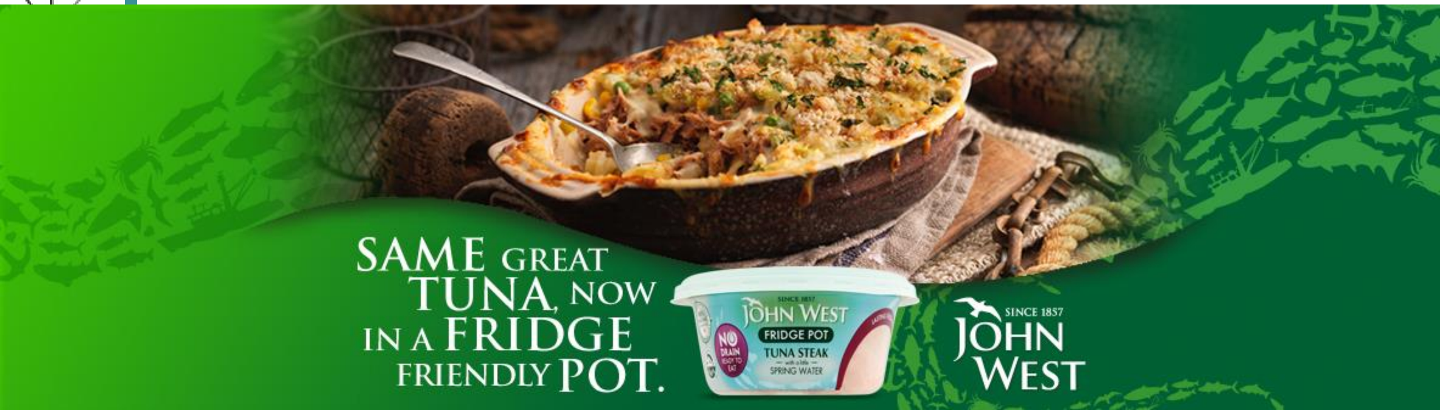
Tuna with olive oil, the best and most tender loins of tuna produced in a 100% natural way, unique process that retains all the properties, texture and delicious taste of your forever tuna without preservatives (**Spain**).

4.2.3 Convenience

A product format that is time-saving, space-saving, easy to prepare or ready-to-eat are important drivers for many consumers. There is an increased focus on simple solutions that fit into a busy everyday life. Likewise, the popularity of fish and seafood fresh snacks is on the rise. In respond to this, seafood suppliers have launched grab-and-go refrigerated seafood snacks.

Easy to prepare shrimps, ideal for appetizers, snacks, pastas and salads (**Portugal**).

Fish nuggets for oven cooking in 20 min. ASC certified (**United Kingdom**).



4.3 Ready meals

4.3.1 Plant-based

Veggie meals is the fastest growing category, which is significant as this market had for a long time been dominated by meat products. For this reason, the major brands usually offering meat-based ready meals are starting to introduce vegetable options. Retailers have increased their plant-based ready meal options by more than 100%.

Tricolor quinoa with shiitake mushrooms and hazelnuts and dehydrated vegetable. Approved taste of the year 2021 Consumer-tested product 2021 Certified. V-Label Vegan logo. European Vegetarian Union Certified (**Portugal**).

Ready to heat lasagna with sun vegetables 100% veggie (**France**).

4.3.2 Environment care

More and more brands are improving their eco credentials as the care for environment is a fast-growing trend. It is foreseen that producers of ready meals that put the environment first will see positive sales growth. Sourcing ingredients produced locally to reduce travel distances and thus CO_2 emitted by transportation is one of the actions that can be taken to find an eco-friendly niche. Other options are using recyclable or compostable packaging to contribute reaching net zero carbon footprint.

Marinated chicken breast fillet thai style, with a 100% recyclable tray and red tractor logo (**United Kingdom**).

Instant brown rice ramen noodles with a miso soup, manufactured according to organic standards which prohibit the use of genetically modified ingredients and promote environmentally friendly, sustainable methods of farming (**Spain**).

4.3.3 Healthier ready meals

The demand for convenience food along with the healthy ingredients in the ready meal is increasing. In recent years, one of the main goals has been the search for healthy products without neglecting taste. Consumers increasingly want healthy convenience foods, such as salad bars or vegetable side dishes. The industry has come up with healthier and more natural dishes whose healthy aspect appeals to consumers.

Organic coral lentil and raisin salad with low-fat vinaigrette (**France**).

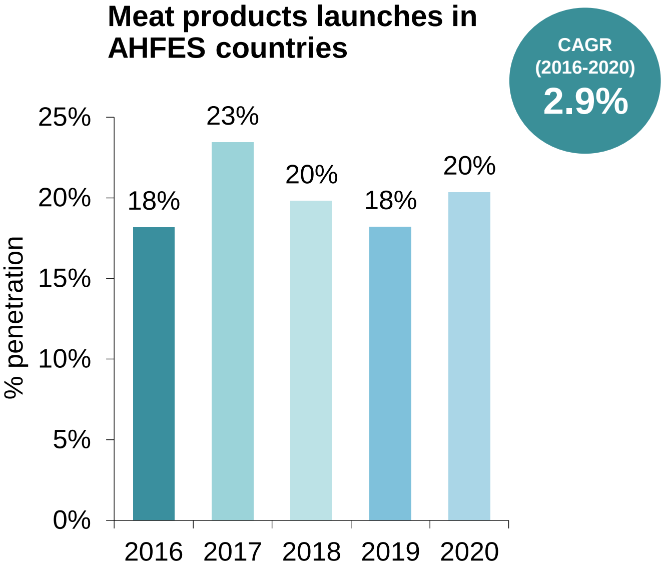
Rice and lentils goodness pot with turmeric, ginger and cumin, high in fibre and source of protein (**Ireland**).

5. Categories

5.1 Meat & meat products

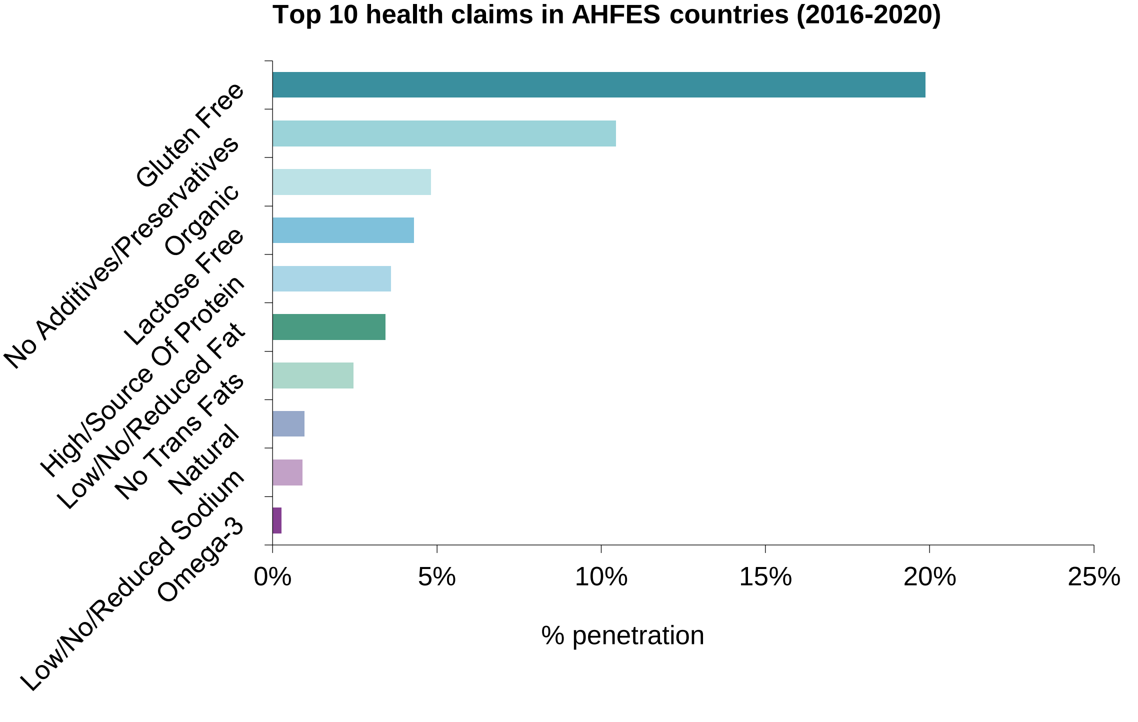
5.1.1 New products and health claims in AHFES countries

Meat product launches within the period 2016 to 2020 showed certain stability, with a slight growth of 2.9%.

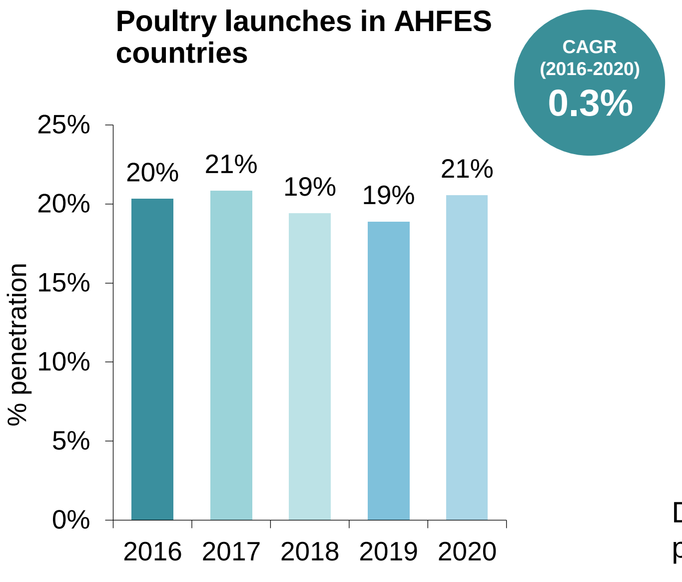


Angus beef steaks, animal welfare certified (**Spain**).

Gluten free is the main health claim, presenting a growth of 5%. Other claims used in meat products are *No additives/preservatives* and *Organic*, growing at rates of 10% and 15%, respectively. Other growing trends are *Lactose free* (30%) and *High/Source of protein* (3%).

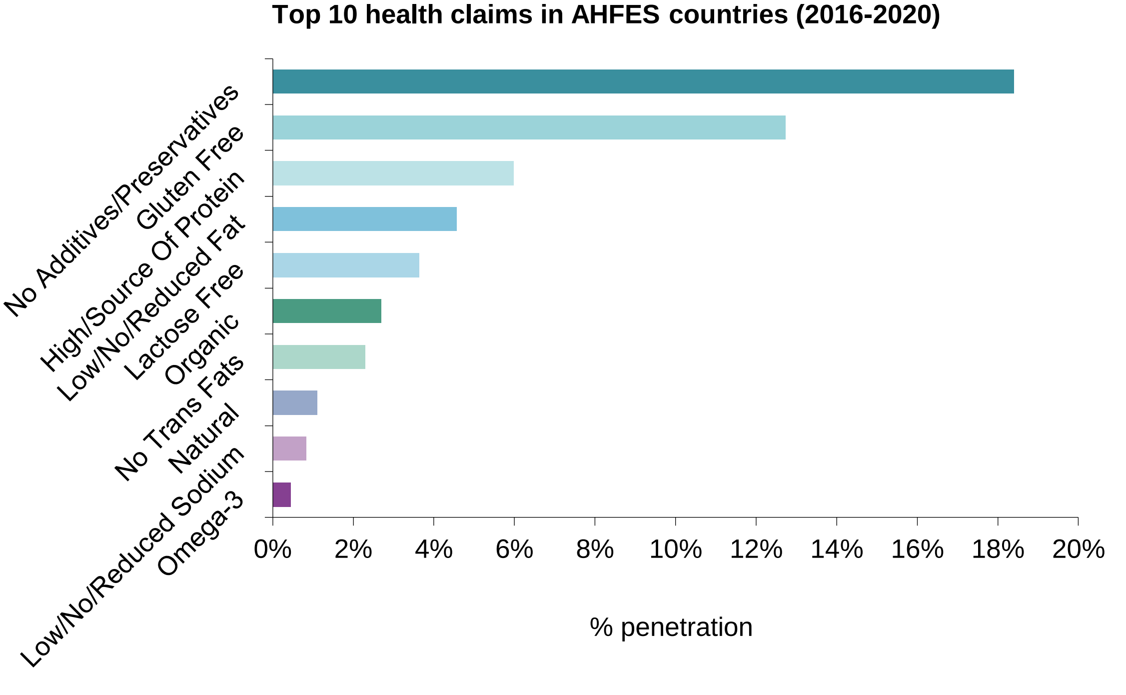


Poultry launches within the period 2016-2020 showed a stable trend.

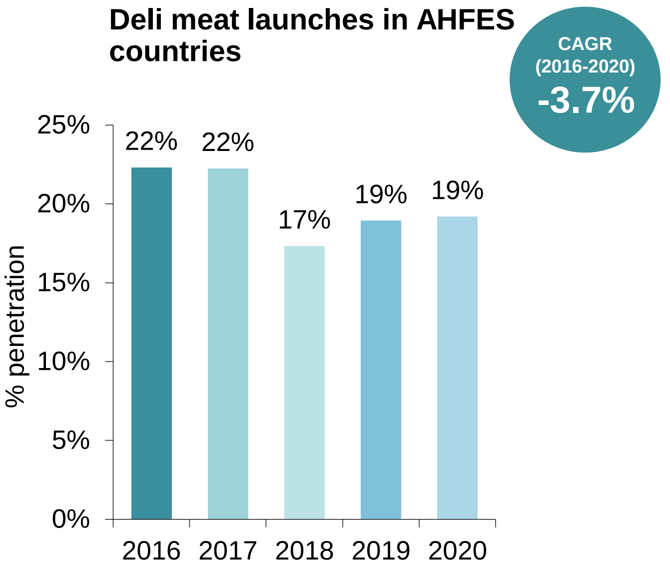


Diced chicken breast, high in protein (**United Kingdom**).

No additives/preservatives and *Gluten free* are the main claims. Other recurrent claims are *High/Source of protein* and *Low/No/Reduced fat,* the latter growing at a rate of 12%. Other growing claims are *Organic* (18%) and *Lactose free* (10%).

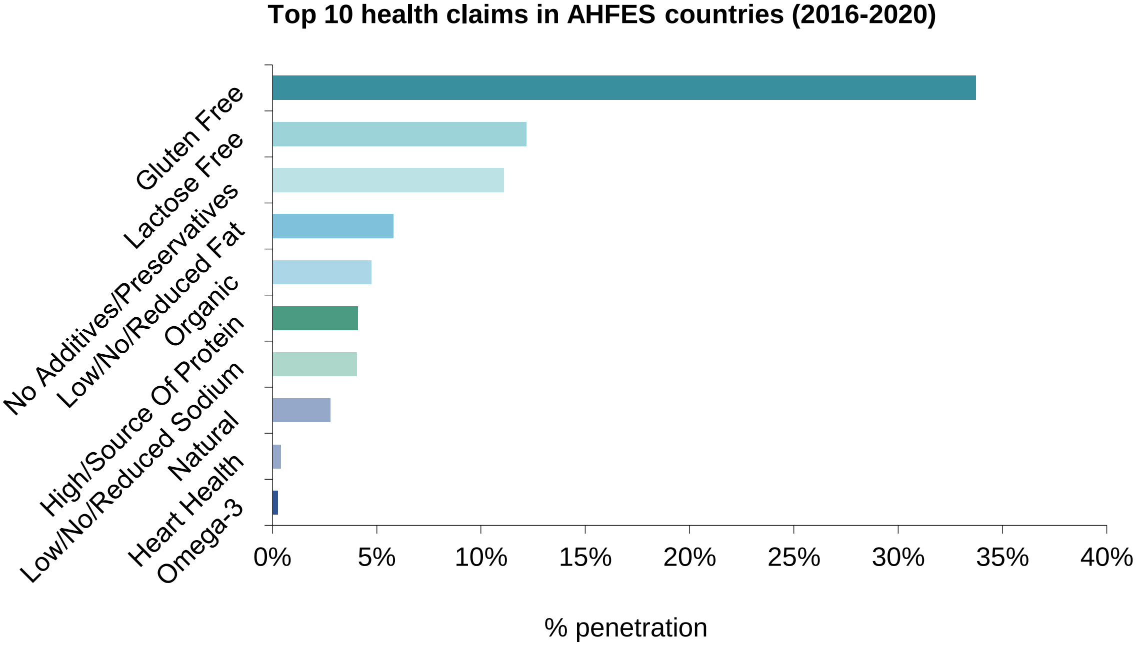


Deli meat launches declined after 2017, with a slight recovery in 2019 and 2020.



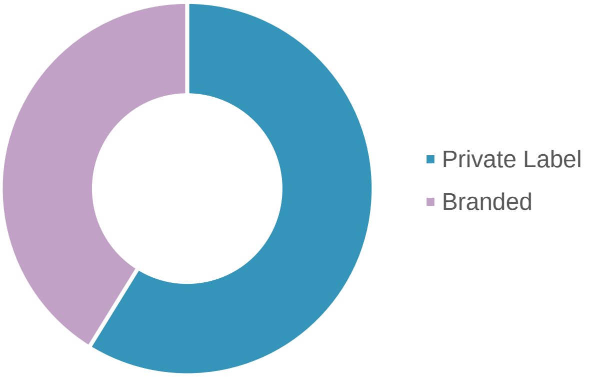
Ham slices, 25% less salt (**France**).

Gluten free is the main, and other recurrent claims are *Lactose free*, with a growth of (5%), *No additives/preservatives*, with a growth of 18% and *Low/No/Reduced fat.* Other growing trends are *Organic (5%)* and especially *Natural (17%)*



5.1.2 Top brands in AHFES countries - Meat

ElPozo, Auchan, Iceland, Continente and Tesco lead the ranking of meat products brands in AHFES countries. The market is covered by 60% of private labels, which are growing at a rate of 5%, and 40% of branded products.



Top 10 main brands in AHFES (New products, 2016-2020)

Top 10 brands	Spain	France	United Kingdom	Portugal	Ireland
1	Elpozo	Auchan	Iceland	Continente	Tesco
2	Carrefour	Charal	Tesco	Monte	Supervalu
3	Eroski	Tendre And Plus	Morrisons	Jaruco	Birds Eye
4	Campofrio	Picard	Sainsburys	Nobre	Deluxe
5	Hacendado	Fleury Michon	Marks And Spencer	Pingo Doce	Tesco Finest
6	El Corte Ingles	Herta	Waitrose	Fumadinho	Butchers Selection
7	Casademont	Le Gaulois	Asda	Continente Selecao	Dunnes
8	Realvalle	Casino	Morrisons The Best	Seleccao Continente	Supervalu Signature Tastes
9	Coren	Maitre Coq	Ashfield Farm	Dulano	Moy Park
10	Unbranded	Carrefour	Tesco Finest	Iglo	Dulano

Gluten free and *No additives/preservatives* are the main claims

Gluten free pork sausages (**Ireland**).

Frozen ready-cooked chicken breast strips with no artificial colors or flavors (**United Kingdom**).

Organic is one of the main growing trends

Ham from organic pork and French farms. Packaging is less than 70% plastic (**France**).

High/Source of protein and *Low/No/Reduced fat* are popular claims

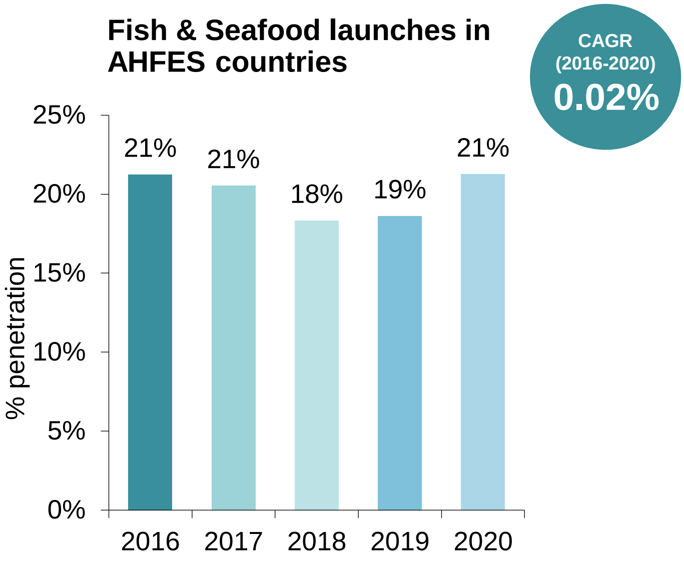
Ox burgers high in protein (**Spain**).

Low fat turkey breast (**Portugal**).

5.2 Fish & Seafood

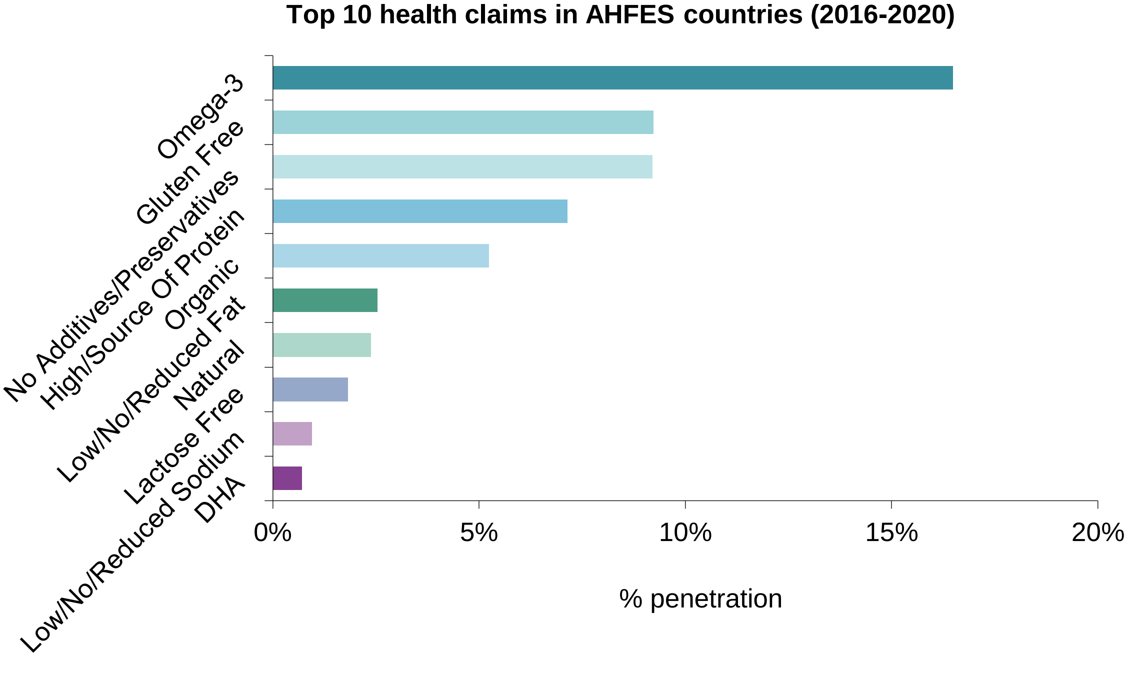
5.2.1 New products and health claims in AHFES countries

Within the period 2016-2020, the launches in AHFES countries of fish and seafood remained stable.



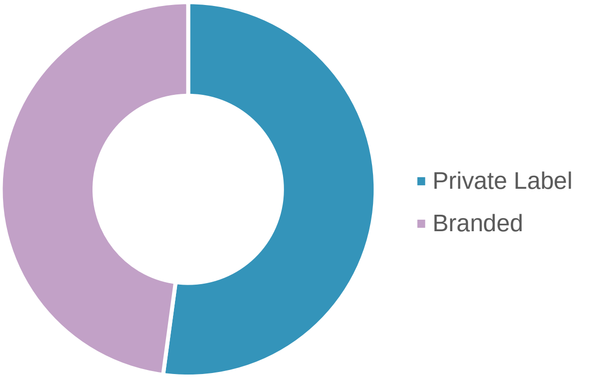
Sardines in olive oil, a natural source of omega-3 (**Spain**).

Omega-3 is the main claim, and it is growing with at a rate of 6%. *Gluten free*, *No additives/preservatives* and *High/Source of protein* are other popular claims, the latter growing at a rate of 15%. Other growing trends are *Organic* (16%) and *Low/No/Reduced fat* (6%).



5.2.2 Top brands in AHFES countries – Fish & Seafood

Hacendado, Picard, Iceland, Iglo and Tesco lead the ranking of fish products brands in AHFES countries. Private labels and branded products present a similar market share, and a slight growth observed in the private labels (3%).



Top 10 main brands in AHFES (New products, 2016-2020)

Top 10 brands	Spain	France	United Kingdom	Portugal	Ireland
1	Hacendado	Picard	Iceland	Iglo	Tesco
2	Carrefour	Carrefour	Morrisons	Pescanova	Donegal Catch
3	Pescanova	Petit Navire	Tesco	Continente	Birds Eye
4	Auchan	Auchan	Waitrose	Bom Petisco	Supervalu
5	El Corte Ingles	Findus	Sainsburys	Socilink	The Fishmonger
6	Eroski	Thiriet	Youngs	Ocean Sea	Deluxe
7	Dia	Intermarch e	Marks And Spencer	Santa Catarina	Tesco Finest
8	Calvo	Monoprix	Morrisons The Best	Nixe	John West
9	Alteza	Casino	Birds Eye	Pingo Doce	Marks And Spencer
10	Isabel	Connetable	Princes	Ramirez	Shines

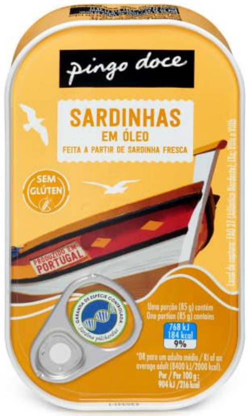
Omega-3 is the most used claim

Prawns **with omega 3** and source of protein (**Spain**).

Organic is a growing trend

Smoked salmon coming from **organic** aquaculture (**France**).

Gluten free, *No additives/preservatives* and *High/Source of protein* are recurrent claims



Sardines in oil **gluten free** (**Portugal**).

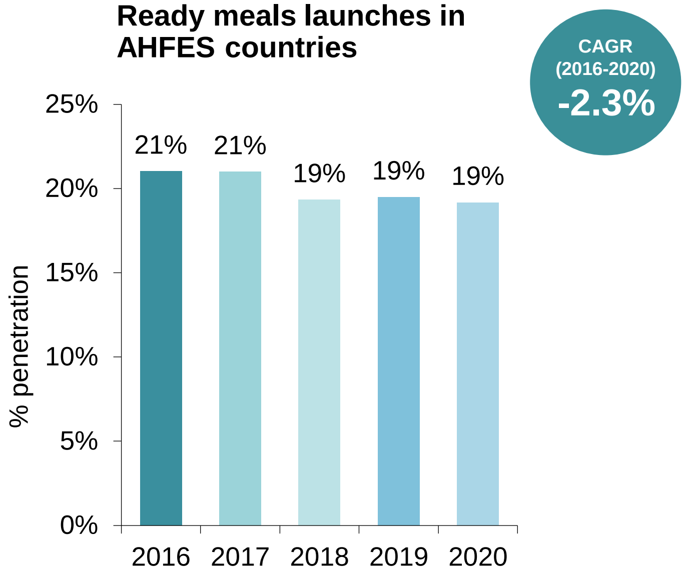
Pollock fillets **with no artificial colours, flavors or preservatives** (**United Kingdom**).

Tuna steak **naturally high in protein** (**Ireland**).

5.3 Ready meals

5.3.1 New products and health claims in AHFES countries

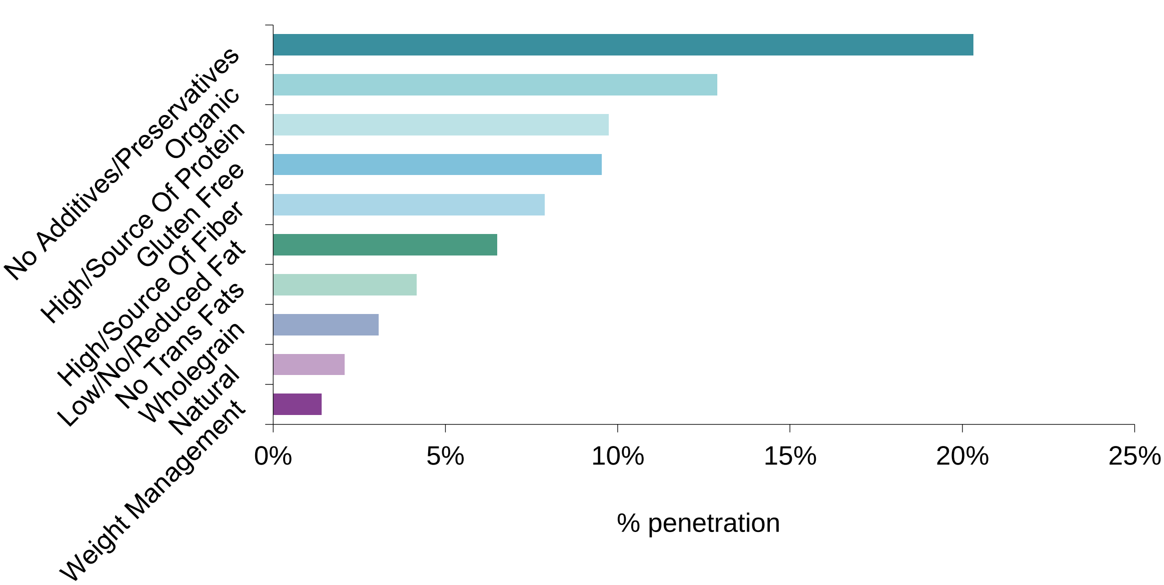
Ready meals launches showed a slight decrease in the period 2016-2020.



On the go tuna salad with no artificial colors, flavors or preservatives (**United Kingdom**).

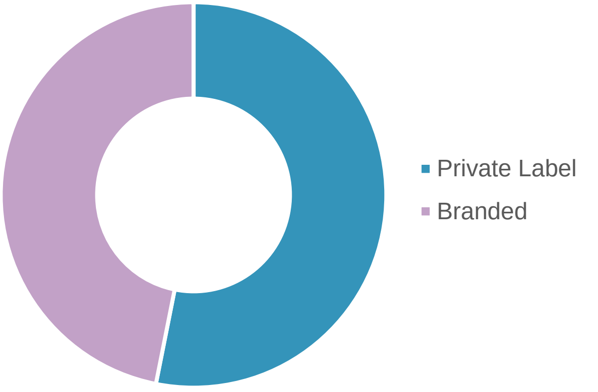
No additives/preservatives and *Organic* are the main claims, the latter growing at a rate of 12%. Other popular claims are *High/Source of protein*, growing at a rate of 8%, *Gluten Free* and *High/Source of fibre*. The claim *Natural* is growing at a rate of 9%.

Top 10 health claims in AHFES countries (2016-2020)



5.3.2 Top brands in AHFES countries – Ready meals

Hacendado, Picard, Morrisons, Continente and Tesco lead the ranking of ready meals products brands in AHFES countries. Private labels and branded products present a similar market .



Top 10 main brands in AHFES (New products, 2016-2020)

Top 10 brands	Spain	France	United Kingdom	Portugal	Ireland
1	Hacendado	Picard	Morrisons	Continente	Tesco
2	Auchan	Auchan	Asda	Chef Select	Tesco Finest
3	Gallo	Thiriet	Iceland	Pingo Doce	Goodfellas
4	Dia	Casino	Tesco	Knorr	Deluxe
5	Alteza	Lustucru	Marks And Spencer	Auchan	Heinz
6	Carrefour	Carrefour	Waitrose	Amanhecer	Iceland
7	El Corte Ingles	Marie	Sainsburys	Fiorini	Mccain
8	Buitoni	Fleury Michon	Morrisons The Best	Giovanni Rana	Old El Paso
9	Consum	Sodebo	Waitrose And Partners	Tradizionale	Marks And Spencer
10	Giovanni Rana	Daunat	Extra Special	Buitoni	San Marco

No additives/preservatives and *Organic* are the main claims

Ready meal with pork and lentils **without coloring, preservatives or flavour enhancers** (**France**).

Quinoa with vegetables, **ingredients from organic farming** (**Spain**).

High/Source of protein and *High/Source of fibre* are popular claims

Plant based chilli con carne **source of fibre and source of protein** (**United Kingdom**).

Sourdough pizza Margherita, **source of fibre** (**Ireland**).

The claim *Natural* is growing

Mediterranean couscous, **with only natural ingredients** (**Portugal**).

6. Conclusions

The meat sector is growing globally, led by Asia Pacific region, and poultry is the fastest growing category. However, in Europe, meat consumption is declining except for poultry, which is reflected in the slow down in sales growth. This tendency is a consequence partially due to an increased number of consumers opting for a flexitarian diet. The top trends in the meat sector are concerns for sustainability, convenience formats, and the increase demand of healthier options. Launches in Europe and, particularly in AHFES countries, show stability. New products carry claims related to convenience and ethical packaging, and there is an increase in claims related to animal welfare and environmental care. Also, indulgent and premium products are growing. In terms of health claims, gluten free products and the reduction or removal of additives and preservatives are on top of the list.

The fish and seafood market is growing, led by Asia-Pacific region. Consumption is also growing especially in Europe, mainly driven by the health benefits associated to fish and seafood. Commitments to sustainability and environmental concerns are increasing, which together to the stories behind the products and convenience formats are the main trends. Launches of fish and seafood in Europe are slightly growing and remain stable in AHFES countries. The industry launch new products in convenience formats and more ethical packaging. Animal welfare is also a concern and is a popular positioning. Omega-3 is the main health claim, as well as the reduction of additives or preservatives and gluten free products. Other popular claim relates to the presence of high levels of protein in fish and seafood products.

Ready meals market is growing globally, led by North America also in terms of consumption, followed by Europe. Conversely, Asia is at the bottom of consumption. The global growth responds to a higher demand for ready to eat food products, easy to prepare and to go. Plant-based products, environmental care and healthier ready meals are the main trends. Launches in Europe show stability, but a slight decline in new products has been identified in AHFES countries. Convenience and ethical packaging are the main positionings, and there is a significant growth of veggie claims. The reduction of additives and preservatives as well as organic products are on top of the health claims. High or source of proteins or fibre are growing.

The opportunities for innovation in the meat and fish sectors include the use of convenient and ethical formats, the reduction of additives and preservatives, delivering sustainability and animal welfare, and the reformulation towards healthier options. As for ready meals, the use of more natural and plant-based ingredients, healthier options and recyclable packaging are among the elements for innovative products.

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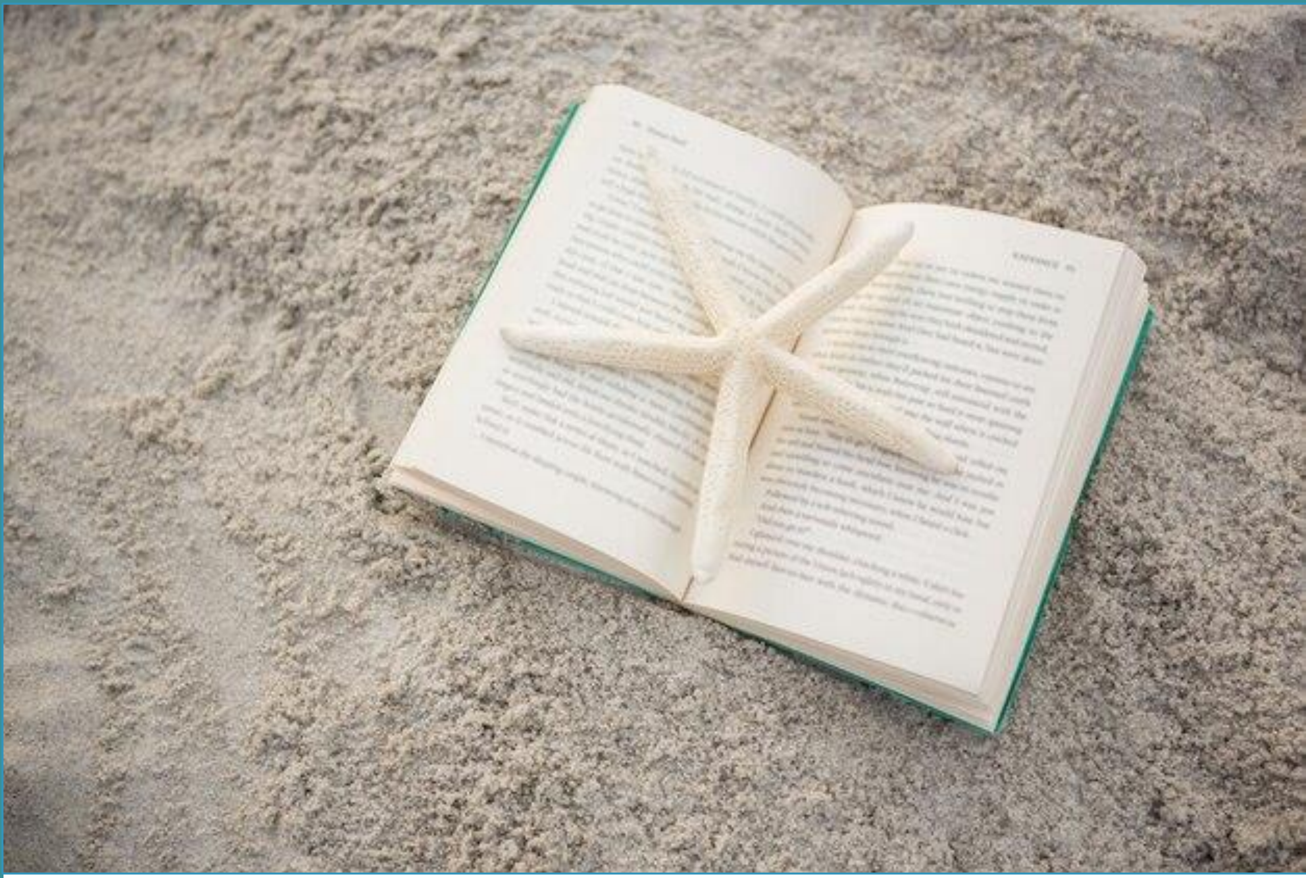

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